myCalPERS Employer Reports (Cognos)

Student Guide

December 7, 2024

CalPERS

myCalPERS Employer Reports (Cognos)

myCalPERS generates reports using IBM Cognos software. Cognos queries your agency's data in myCalPERS and generates predefined reports with your chosen criteria in different formats.

Disclaimer

As a security safeguard, business partner and participant information has been masked within the figures in this procedure guide.

System Access

Your myCalPERS access roles determine which report you can run. If you are unable to run a report, contact your agency's system access administrator to update your myCalPERS access.

Training Opportunities

Prior to taking a myCalPERS training, new users should review the Introduction to myCalPERS for Business Partners (PDF) student guide.

Contents

myCalPERS Employer Reports Resources

myCalPERS Employer Reports (Cognos) Catalog

The myCalPERS Employer Reports (Cognos) Catalog provides a list of available reports, samples of the reports, descriptions, and user role needed to generate each report.

You can also filter reports by one of the following report types:

- Benefits
- Contributions
- Enrollments
- Financials
- Health
- Payroll
- Retirement Contracts
- Retirement Enrollments
- System Access Administration

Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > myCalPERS Employer Reports (Cognos) Catalog

Internet Browsers & Configuration

The IBM Cognos Analytics page provides a complete list of internet browsers that support IBM Cognos Analytics, including the version and additional information.

Pathway: IBM Cognos Analytics website > Supported Software tab > Web Browsers section (bottom of page)

IBM Cognos Analytics uses default browser configurations, but additional setting configurations may be required. Visit the IBM Brower Settings page for details.

Pathway: IBM Cognos Analytics website > Search: browser requirements > Version: 11.0

myCalPERS System Access Administration Student Guide

The myCalPERS System Access Administration (PDF) student guide provides your system access administrator(s) the steps to maintain your agency's system access necessary to run reports.

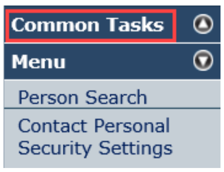
Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators > myCalPERS System Access Administration (PDF)

Scenario 1: Manage My Content

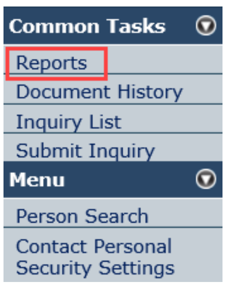
Within the My content folder, you will add folders and subfolders, and rename and delete folders and reports.

Step Actions (16 steps)

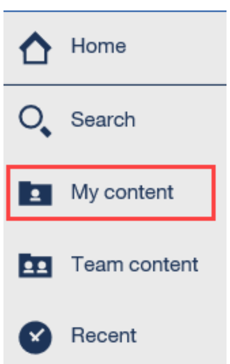
Step 1 From the homepage, select Common Tasks from the left-side navigation.



Step 2 Select the **Reports** left-side navigation link.



Step 3 From the left-side navigation, select the My content folder.



Add Folder

Step 4 Select the New folder icon.

Step 5 Select the **Folder** button.

Step 6 Enter a name for your folder.

Step 7 Press the Enter key on your keyboard.

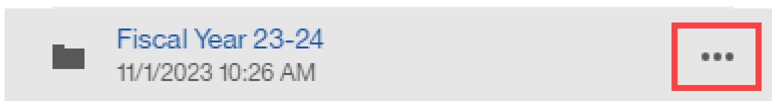
Add Subfolder

Step 8 From the My content folder, open the folder where you will add a subfolder.

Step 9 Repeat steps 4-7.

Delete

Step 10 From the My content folder, select the More icon next to the item.

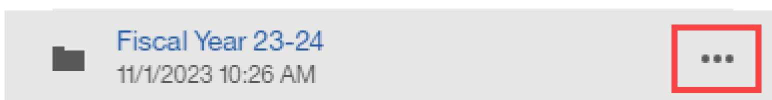


Step 11 Select Delete.

Step 12 Select the **OK** button.

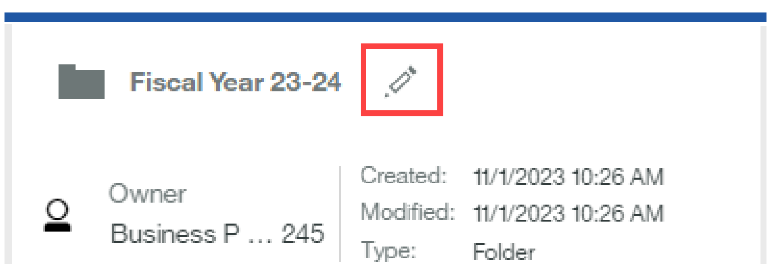
Rename

Step 13 From the My content folder, select the More icon next to the item.



Step 14 Select Properties.

Step 15 Select the Edit (pencil) icon.



Step 16 Update the name of the item.

You have completed this scenario.

Scenario 2: Run Reports

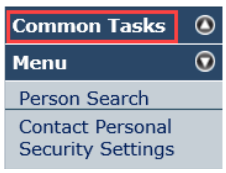
You will run a report, change the format, save, and then locate the saved report.

System Logic

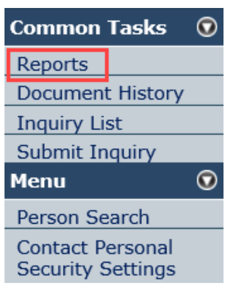
To re-run a report within the same session, update the report criteria (refer to scenario 3).

Step Actions (16 steps)

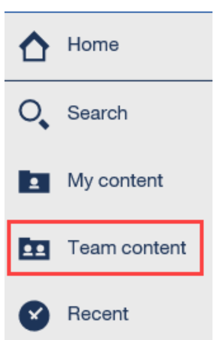
Step 1 From the homepage, select Common Tasks from the left-side navigation.



Step 2 Select **Reports** left-side navigation link.



Step 3 From the left-side navigation, select the Team content folder.



Step 4 Select the **PSR_REPORTS_ENV98** link.

Run Report

Step 5 Select the report name link.

Step 6 Complete the report criteria.

Step 7 Select the **Finish** button.

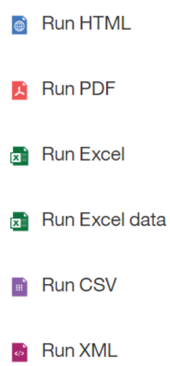
Change Report Format

Step 8 Do you want to run the report in a different format?

Yes: Select the Run as icon in the top left corner of the page.

No: Skip to step 10.

Step 9 Select a format.



Save Report

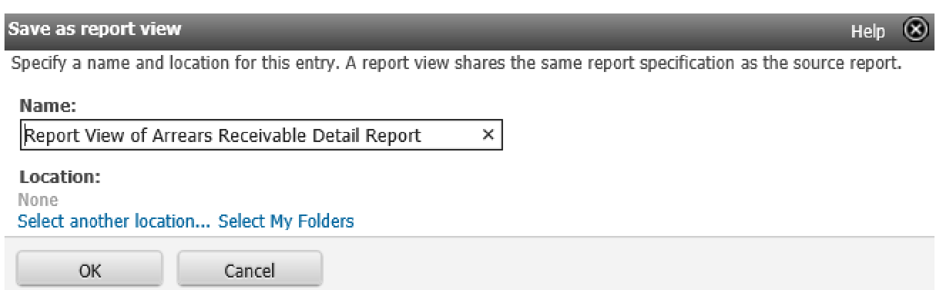
Step 10 Do you want to save the report?

Yes: Select the Add this report icon in the top left corner of the page.

No: **You have completed this scenario.**

Step 11 Select Save this report as report view….

Step 12 If desired, rename the report.

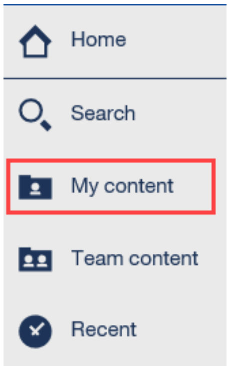


Step 13 Choose the **Select My Folders** link.

Step 14 Select the **OK** button.

Locate Saved Report

Step 15	From the left-side navigation, select the My content folder.



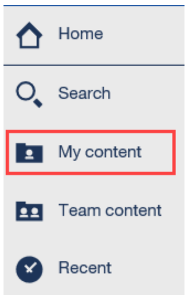
Step 16	Select the link for the saved report to display it. **You have completed this scenario.**

Scenario 3: Update Report Criteria

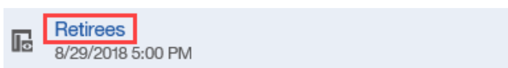
You will update the criteria of a report that is saved in your My content folder.

Step Actions (7 Steps)

Step 1 From the left-side navigation, select the My content folder.



Step 2 Select the link for the saved report.

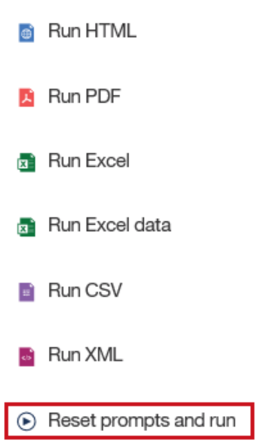


Step 3 Select the Run as icon in the top left corner of the page.

Step 4 Did the criteria page display?

Yes: Skip to step 6.
No: Continue to step 5.

Step 5 If the criteria page doesn't display, select Reset prompts and run.



Step 6 Complete the report criteria.

Step 7 Select the **Finish** button.

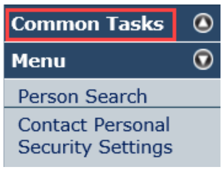
You have completed this scenario.

Scenario 4: Run Reports in Different Formats

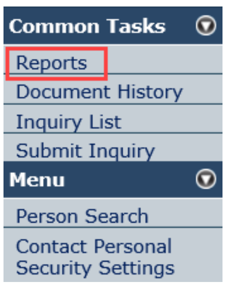
You will run a report in a format other than HTML (default).

Step Actions (10 Steps)

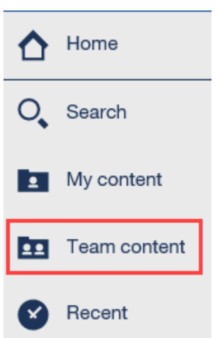
Step 1 From the homepage, select Common Tasks from the left-side navigation.



Step 2 Select **Reports** left-side navigation link.



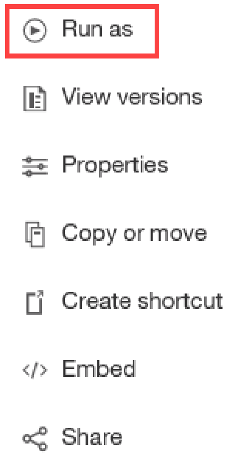
Step 3 From the left-side navigation, select the Team content folder.



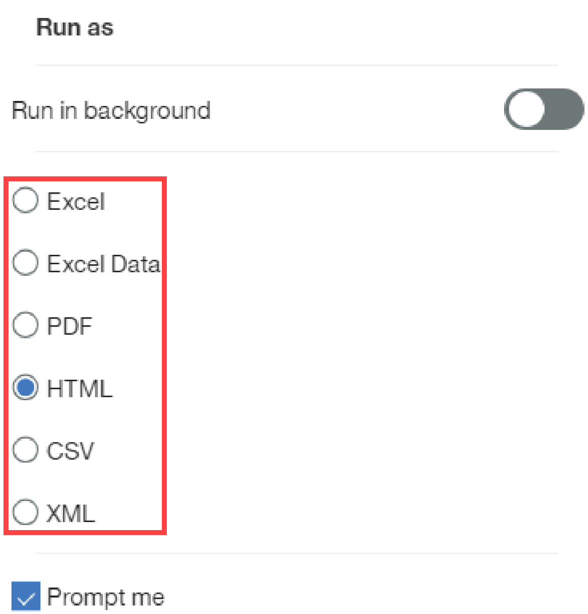
Step 4 Select the **PSR_REPORTS_ENV98** link.

Step 5 Select the More icon for the report.

Step 6 Select Run as.



Step 7 Select a report format.



Step 8 Select the **Run** button at bottom right.

Step 9 Complete the report criteria.

Step 10 Select the **Finish** button.

You have completed this scenario.

Scenario 5: Create Report View (Shortcut)

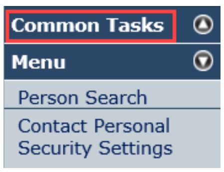
You will create a shortcut to run a report.

System Logic

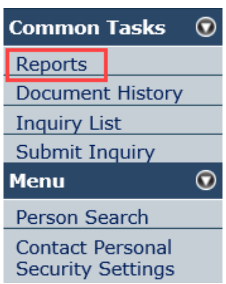
Do not use the Create Shortcut option as it may stop functioning over time.

Step Actions (14 steps)

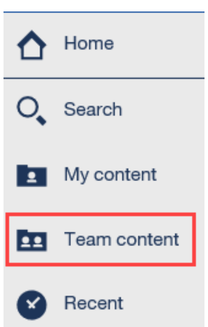
Step 1 From the homepage, select Common Tasks from the left-side navigation.



Step 2 Select **Reports** left-side navigation link.



Step 3 From the left-side navigation, select the Team content folder

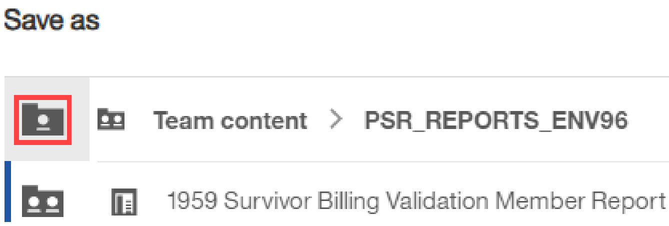


Step 4 Select the **PSR_REPORTS_ENV98** link.

Step 5 Select the More icon for the report.

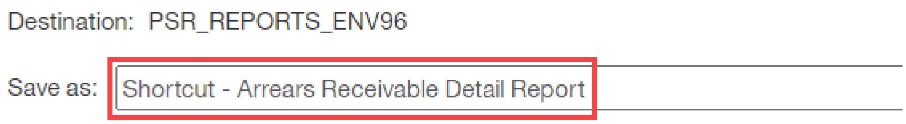
Step 6 Select Create report view.

Step 7 Select the My content folder in the upper left.



Step 8 You can either save the shortcut in your My content folder or select one of the folders you created.

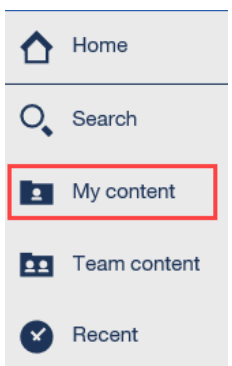
Step 9 **Tip:** At the bottom, we recommend renaming the report with Shortcut in the title to help differentiate between a shortcut to a report and a report.



Step 10 Select the **Save** button.

Locate and Run Saved Report

Step 11 From the left-side navigation, select My content.



Step 12 Select the link for the saved report.

Step 13 Complete the report criteria.

Step 14 Select the **Finish** button.

You have completed this scenario.

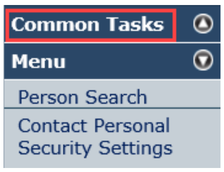
Scenario 6: Run in the Background

Large reports may take additional time to run. You will run a report in the background, allowing you to use Cognos while the report is generated.

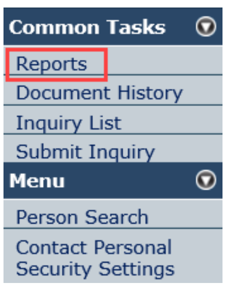
Step Actions (27 steps)

Locate Report

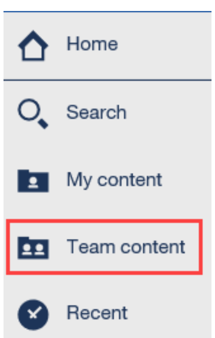
Step 1 From the homepage, select Common Tasks from the left-side navigation.



Step 2 Select **Reports** left-side navigation link.



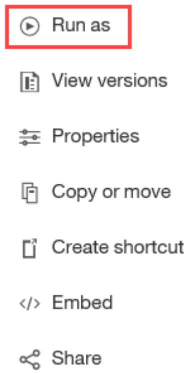
Step 3 From the left-side navigation, select the Team content folder.



Step 4 Select the **PSR_REPORTS_ENV98** link.

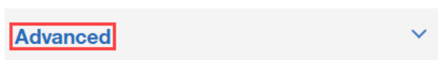
Step 5 Select the More icon for the report.

Step 6 Select Run as.

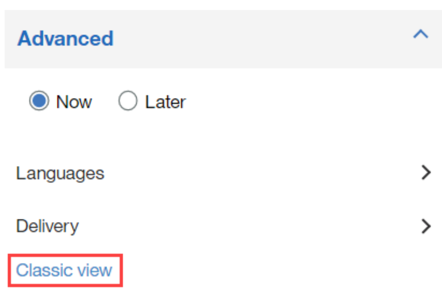


Step 7 Turn on Run in background.

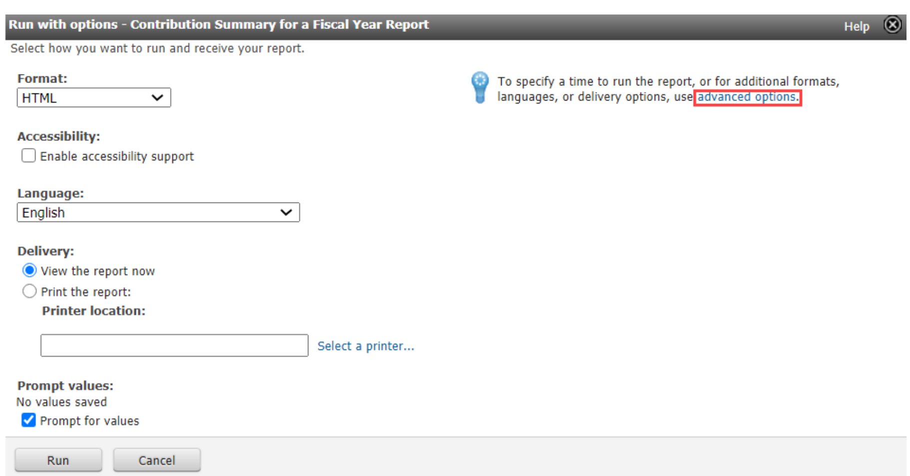
Step 8 Select Advanced to expand the section.



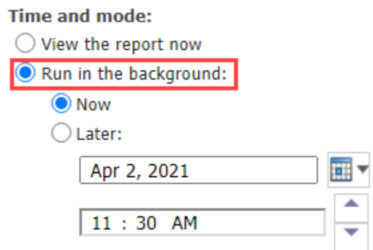
Step 9 Select the **Classic view** link.



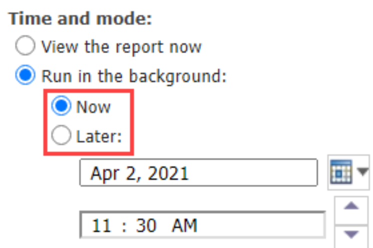
Step 10 Within the Run with options section, select the **advanced options** link.



Step 11 Within the Time and mode sub-section, select the **Run in the background** radio button.

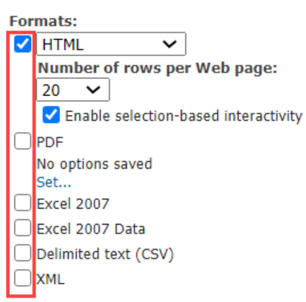


Step 12 Select either the **Now** or **Later** radio button.



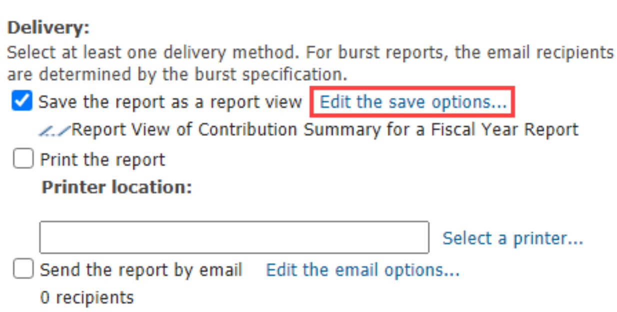
Step 13 If you selected the **Later** radio button, enter a date and time for the report to run.

Step 14 Within the Formats sub-section, select the check boxes for the format(s).



Note: There may be additional features available within each available format.

Step 15 Within the Delivery sub-section, select the **Edit the save options…** link.



Note: Do not change the delivery method to print or email.

Step 16 Within the Save as report view section, enter your report name.

Step 17 Select the **OK** button.

Step 18 Select the **Run** button.

Report Criteria

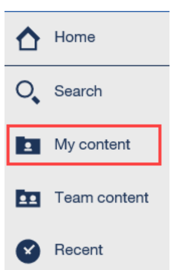
Step 19 Enter the criteria for the report.

Step 20 Select the **Finish** button.

Step 21 Select the **OK** button.

Locate Generated Report

Step 22 From the left-side navigation, select the My content folder.

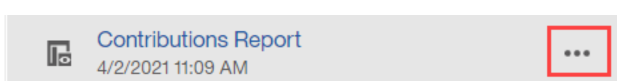


Step 23 Did you select more than one format?

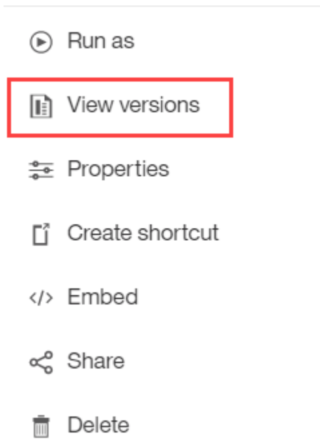
Yes: Continue to step 24.

No: Select the report link. **You have completed this scenario.**

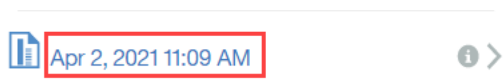
Step 24 Select the More icon for the report.



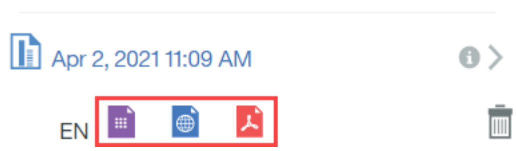
Step 25 Select View versions.



Step 26 Select the **Date** link.



Step 27 Select the format you wish to display.



You have completed this scenario.

Scenario 7: Schedule Reports

You will run a report and save it within your My content folder. From there you will:

- Set a recurring schedule
- View versions
- Update schedule
- Delete schedule

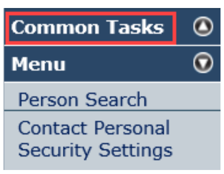
System Logic

- To set a schedule for a report, it must first be run and saved within the My content folder.
- Only one schedule can be associated with each entry.
- All schedules must have an end date to properly run.

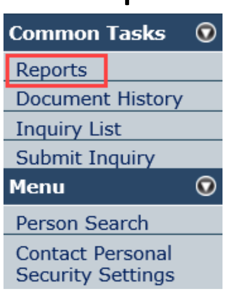
Step Actions (39 steps)

Run

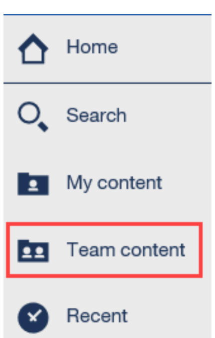
Step 1 From the homepage, select Common Tasks from the left-side navigation.



Step 2 Select **Reports** left-side navigation link.



Step 3 From the left-side navigation, select the Team content folder.



Step 4 Select the **PSR_REPORTS_ENV98** link.

Step 5 Select the report link.

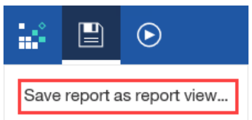
Step 6 Complete the report criteria.

Step 7 Select the **Finish** button.

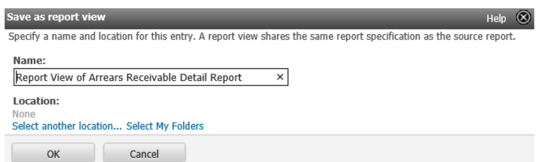
Save

Step 8 Select the Add this report icon in the top left corner of the page.

Step 9 Select Save this report as report view….



Step 10 If desired, rename the report.

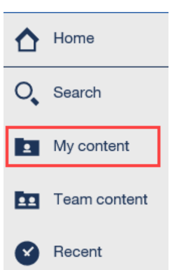


Step 11 Select the **Select My Folders** link.

Step 12 Select the **OK** button.

Set Schedule

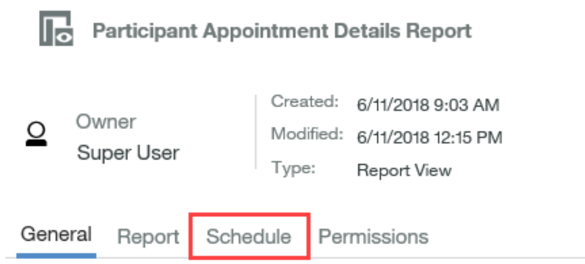
Step 13 From the left-side navigation, select My content.



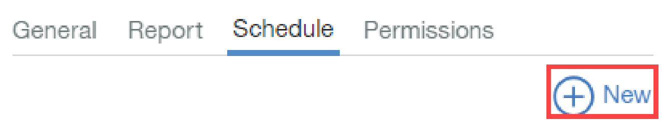
Step 14 Select the More icon for the saved report.

Step 15 Select Properties.

Step 16 Select the Schedule tab.



Step 17 Select the New icon.



Step 18 From the Schedule drop-down list, choose Daily, Weekly, Monthly, or Yearly.

Step 19 Under the Period section, you can change the start or end date (always have an end date).

Note: Do not select the *No end date* check box.

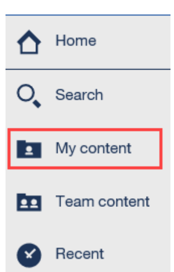
Step 20 **Optional:** Under the Options section, select the HTML format icon to choose other formats for the report. Within the Format panel, select the format check box(es), and then select the **Done** button.

Step 21 Under the Options section, confirm that the Delivery method is Save and the correct prompts (criteria) are selected/entered.

Step 22 Select the **Create** button.

View Versions

Step 23 From the left-side navigation, select My content.



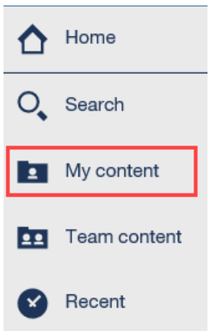
Step 24 Select the More icon for the saved report.

Step 25 Select View versions.

Step 26 Under the Versions tab, select the blue date link.

Update Schedule

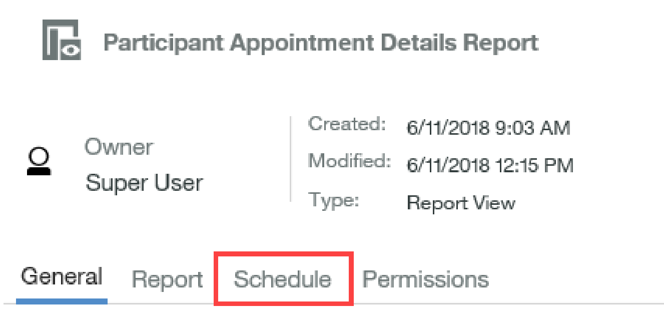
Step 27 From the left-side navigation, select My content.



Step 28 Select the More icon for the saved report.

Step 29 Select Properties.

Step 30 Select the Schedule tab.



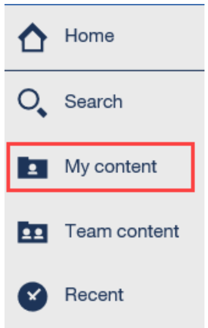
Step 31 Select the right arrow for the schedule.

Step 32 Update the schedule.

Step 33 Select the **Update** button.

Delete Schedule

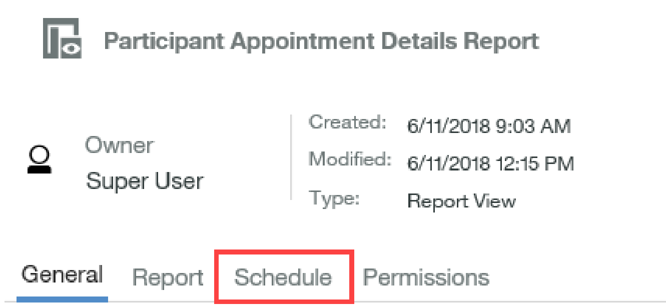
Step 34 From the left-side navigation, select My content.



Step 35 Select the More icon for the saved report.

Step 36 Select Properties.

Step 37 Select the Schedule tab.



Step 38 Select the **Delete** button.

Step 39 Select the **OK** button.

You have completed this scenario.

CalPERS Resources

Obtain more information by visiting the CalPERS website at www.calpers.ca.gov.

- myCalPERS Student Guides & Resources
  Pathway: CalPERS website > Employers > I Want To…: Find myCalPERS Student Guides
- Business Rules & myCalPERS Classes
  Pathway: CalPERS website > Employers > I Want To…: Attend Training & Events > Business Rules & myCalPERS Classes
- myCalPERS Technical Requirements
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements
- System Access Administrators
  Pathway: CalPERS website > Employers > myCalPERS Technical Requirements > System Access Administrators

CalPERS Contacts

Email

- To contact employer educators for questions and requests, email **calpers_employer_communications@calpers.ca.gov**.
- To contact the Employer Response Team for assistance with your most critical, complex, or time-sensitive issues, email **ert@calpers.ca.gov**.

Phone or Fax

You can reach CalPERS at **888 CalPERS** (or **888-**225-7377), Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.

- TTY: (877) 249-7442 (This number does not accept voice calls)
- CalPERS centralized fax number: (800) 959-6545
- Employer Response Team phone number: (800) 253-4594

Submit Inquiry

You can send secure messages through myCalPERS. Expand the Common Tasks left-side navigation folder and select the **Submit Inquiry** link to submit a question or request.

Report Requests

In the event a Cognos report does not provide the information you need, you may request a custom report. Allow 6-10 weeks to fulfill each request. Additional paperwork and approval may be required for each request.

- For payroll or retirement reports, email employer_technical_support@calpers.ca.gov.
- For health reports, email hamd_data_services@calpers.ca.gov.